

Financial Consultant

Posted By: Valley First, A Division Of First West Credit Union

Location: Penticton

Salary: \$\$52,400-\$65,600 Per Year

JOB ID : RJ4345447

Posting Date : 25-Feb-2026

Expiry date : 24-Aug-2026

Education : College Diploma

Language : English

Vacancies : 1

Years of Experience : 1 year

Job Type : Full Time

Job Description

We are looking to add a financial advisor to our team right now.

By providing a comprehensive variety of deposit/investment and complicated loan options, the financial advisor offers outstanding customer service to both existing and prospective members. This position determines the member's life stage cycle, addresses their financial requirements, and/or connects them with the right adviser. Members' portfolios are managed by the financial advisor.

A normal day would consist of the following items.

Member service involves establishing trusting connections with both existing and prospective members, determining the stages of a member's life, and offering financial guidance to members or directing them to the right adviser.

Member Transactions: Handles a wide range of intricate member transactions, such as opening personal or business accounts, debit/credit cards, LOC/overdraft protection, personal loans, retail mortgages, and RRSP loans; investment products (usually involving less than \$100K in investable assets); and associated insurance products.

Branch Goals: Promotes FW goods and services proactively, participates in branch campaigns, and actively looks for any cross-sell and/or referral possibilities during interactions with members or prospective members in order to support the accomplishment of yearly branch goals and objectives. meets predetermined yearly goals for sales and referrals.

Branch Support: Carries out a range of administrative tasks, such as estate administration, loan application processing, credit research, and member follow-up calls as needed.

additional responsibilities as mandated by branch leadership. prioritizes and manages schedules using the Day in the Life as a reference, coordinating efforts to achieve objectives and providing an exceptional, consistent member experience across First West.

Branch Differentiation: The following may be relevant depending on the members' demands and unique circumstances:

Credit services will be consulted when determining lending restrictions, which will be determined by competence and experience.

Building and maintaining a strong presence and relationships in the community is a crucial responsibility in pilot settings.

Qualifications, Experience, and Skills Needed

A two-year college or technical school diploma in a comparable field, or an equivalent set of training and experience, is necessary.

PFP is a benefit; a mutual fund license is necessary.

must finish the First West internal certification course tailored to this position in the allotted period.

Two years of experience as a member advisor or a similar position.

Proven capacity to recognize members' needs and suggest goods and services

Self-starter who can work independently and use good judgment and common sense to solve difficulties

shown aptitude for task planning, organization, and prioritization

competent with computer applications, such as banking and Microsoft Office

demonstrates compliance with rules and procedures, demonstrating a grasp of risk and risk ownership.

What you stand to gain:

First and foremost, we want our team members to feel really rewarded. You'll possess:

Resources and coverage for mental health

Personalized health benefits and increased parental leave

Group RRSP matching, employee banking benefits, and performance-based pay

Flexible work schedules and vacation time to complement your lifestyle

We are dedicated to providing a competitive, fair, and equitable compensation plan that accurately represents each person's contribution to our company. This job posting's pay should be used as a reference. The overall amount of money received may vary depending on a number of variables, such as incentives and/or bonuses, a person's qualifications and experience, and success in the position.

Additionally, we support and encourage our staff members to have a significant effect. After all, giving back, both in large and little ways, is what drives us as a credit union. For this reason, we provide paid time off for workers to volunteer, collaborate with hundreds of local charities, create enduring connections that support our members' success, and dedicate ourselves to environmental, social, and governance (ESG) principles.

You will be able to reach your full potential by becoming a member of our team. With access to LinkedIn Learning, award-winning internal training programs, and reimbursement for outside courses, we're here to help you succeed wherever your own purpose takes you.

Joining our team will help you advance your career. Apply for this chance!

Candidates, please be aware that you will need to submit to a background check, which includes a credit check, criminal record check, and employment verification, if you are being considered for this position.

Belonging, Inclusion, Equity, and Diversity

Regardless of a person's gender identity or expression, sexual orientation, religion, color, ethnicity, age, ability, or any other characteristic that makes them special, we at First West Credit Union value diversity. Our company's recruiting procedures, employee-led network groups, and educational initiatives that break down barriers and continuously expand our diverse, inclusive, and egalitarian culture are all interwoven with inclusion.

Individuals from equity-deserving groups, such as women or non-binary individuals, people with various abilities, Black people, Indigenous peoples, people of color, and members of 2SLGBTQIA+ communities, are encouraged to apply for a job with us.

Please let us know if there is any way we can help you throughout the application or interview process for a job with us. This might include creating information in a different format, scheduling an accessible meeting space, or making other arrangements.

We value your uniqueness here.

Concerning Us

As a financial cooperative, we operate in a unique way. We provide complete banking solutions that empower individuals to successfully achieve their objectives, as well as tried-and-true guidance that gives our members hope for the future. We use a distinctive grassroots approach to service and preserve local relationships with our communities thanks to the financial stability and wide branch network of a major financial institution. Under the Envision Financial, Valley First, Island Savings, and Enderby & District Financial brands, our more than 250,000 customers and over 1,250 workers operate from 45 locations throughout the province of British Columbia. To learn more about First West Credit Union, go to firstwestcu.ca.

Although we value your interest, we will only get in touch with those who are chosen for an interview.

Posted on refugeejobportal.com